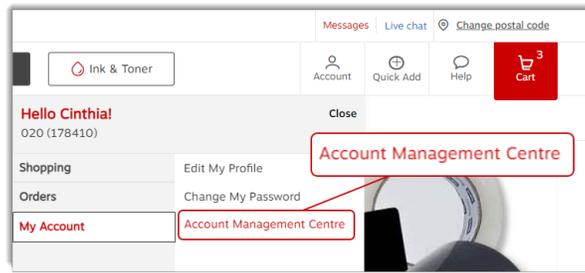


Approval Groups

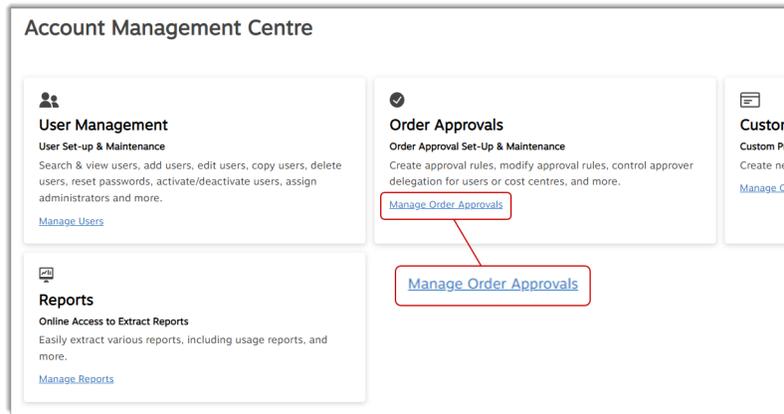
- You can define an Approval Group made up of 3 parts:
 - the approval rules
 - the individuals whose orders are subject to these rules
 - the individuals responsible for approving or rejecting the orders that exceed these rules
- Use the **Order Approvals** feature in away to create your own Approval chain.

Access the Order Approvals Feature

- From the **Account** menu, hover the **My Account** tab and select option **Account Management Centre**.



- From the **Account Management Centre** page, click on the link **Manage Order Approvals** in the **Order Approvals** tile.



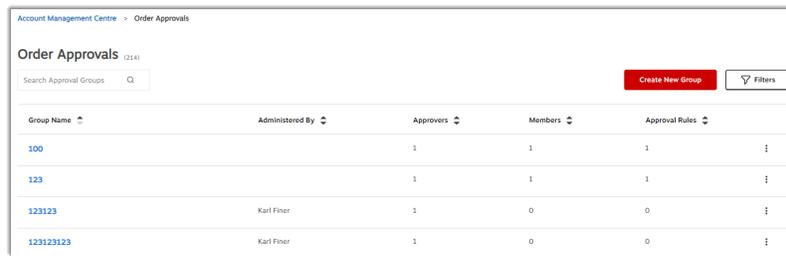
Approval Groups Home Page

The Home page displays all existing approval groups.

- You can use the breadcrumbs at the top of the page to navigate between the pages you have visited.
- The number of existing approval groups in the list is displayed in parentheses to the right of the page title.
 - This number varies when a search or filter is applied.
- Use the column headers to sort list contents in ascending or descending order.



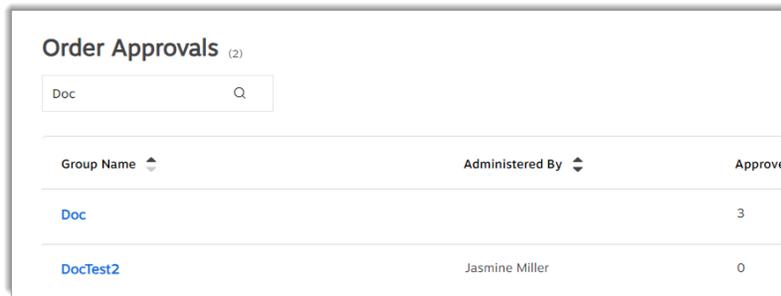
Depending on your administrator level, either advanced or intermediate, the list could display all the approval groups in your organization or only the approval groups that you administer.



Group Name	Administered By	Approvers	Members	Approval Rules
100		1	1	1
123		1	1	1
123123	Karl Finer	1	0	0
123123123	Karl Finer	1	0	0

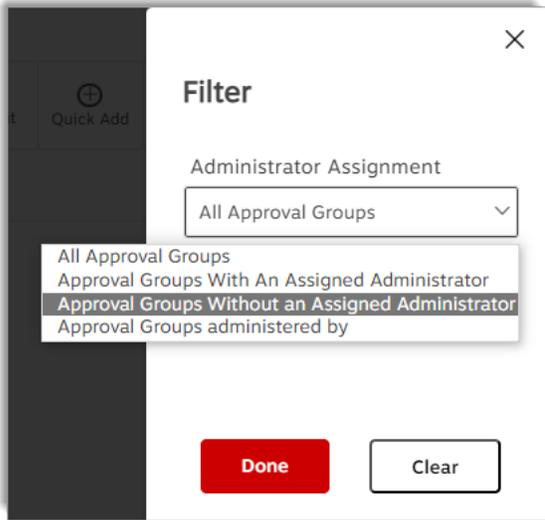
Search for an Existing Approval Group

- To edit, view or delete an existing approval group, you must first use the search options to find the group.
- Enter the text you are looking for.
 - Intuitive search displays results as you enter text.



Group Name	Administered By	Approvers
Doc		3
DocTest2	Jasmine Miller	0

Filter the Approval Groups Listing



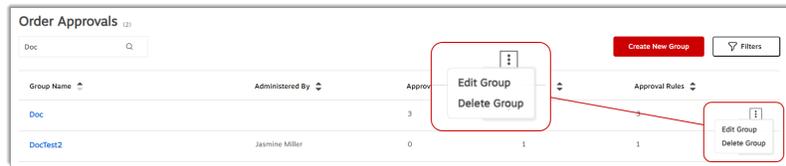
- Use the filter to narrow your search.
 - All Approval Groups
 - Groups with an assigned admin
 - Groups without an assigned admin
 - Groups with a specific admin
 - Specify the admin in question.
- Click on **Done**.



The filter option is grayed out for intermediate users. This type of administrator can only see the groups they administer, so the filter has no impact on the list of approval groups.

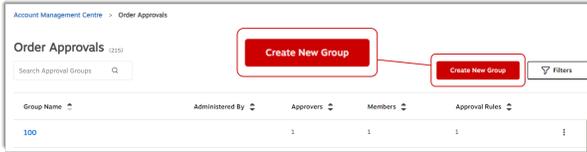
Manage Approval Groups

- After finding the approval group you are looking for.
 - Click on the blue name of the group to view it.
 - Click the ellipsis menu.
 - You can **Edit** approval group.
 - You can **Delete** the approval group.

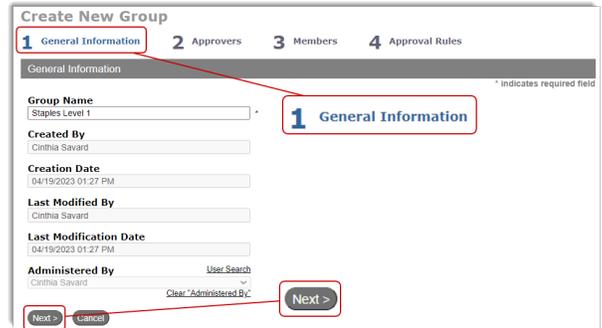


Creation Step 1 - General Information

- To create a new approval group, click on the **Create New Group** button.

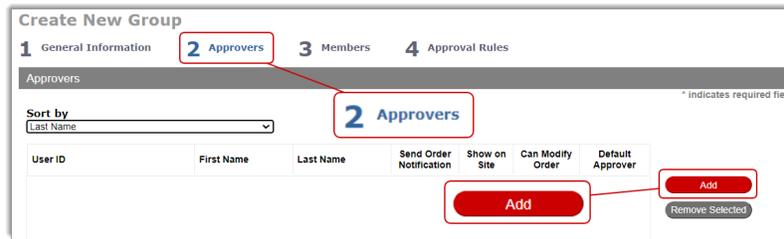


- Name your group.
- Click on **Next**.



Creation Step 2 - Approvers

- Name the individuals who will be responsible for approving or rejecting the orders.
 - Click on the **Add** button to open the **Search for an Approver** window.



- Use the **Search for an Approver** function to find the individuals to be named as Approvers.
- Select the field that will be used to perform the search.
- Enter the text you are looking for.



You may use the asterisk [*] as a wildcard character to complete a partial entry. If you enter only an asterisk as the text to search for, you will get the complete list of users.

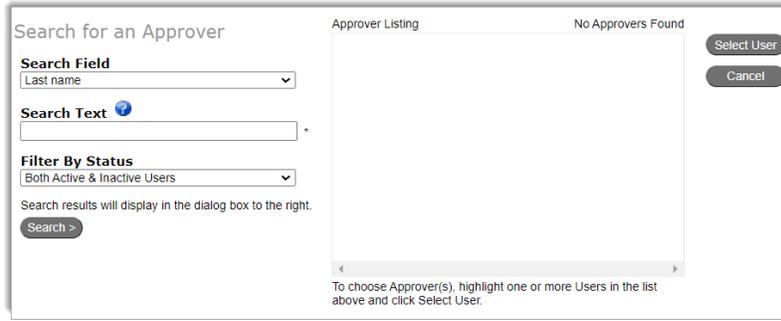
- Use the filter to narrow your search.



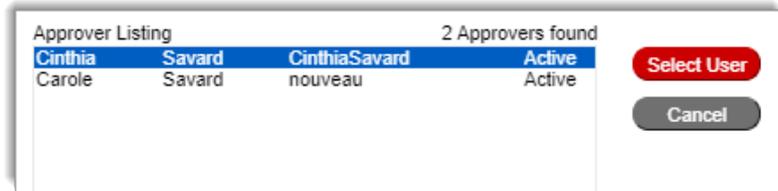
The Filter button doesn't display for Intermediate users. These users can only view groups they administer.

- Click on **Search**.

Creation Step 2 - Approvers



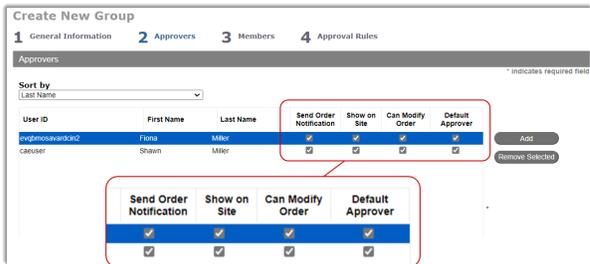
- Select one or more individuals. Use the *Ctrl* key for multiple selections.
- Click on **Select User** to confirm the selection.



First Name	Last Name	Status
Cinthia	Savard	Active
Carole	Savard	Active

Creation Step 2 - Approvers

- For each approver, these options can be enabled or disabled.



User ID	First Name	Last Name	Send Order Notification	Show on Site	Can Modify Order	Default Approver
eng@staples.com	Fiona	Miller	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
causer	Shawn	Miller	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Check **Send Order Notification** so that this approver receives a notification email when an order is waiting for approval for his group.
- Check **Show on site** to have the name and email address of this approver appear in the Review and Confirm screen of the Check-out process.
- Check **Can modify order** to allow this approver to make changes to the order before it is approved.
- Check **Default approver** to have this approver automatically selected to receive the notification email in the Review and Confirm page.

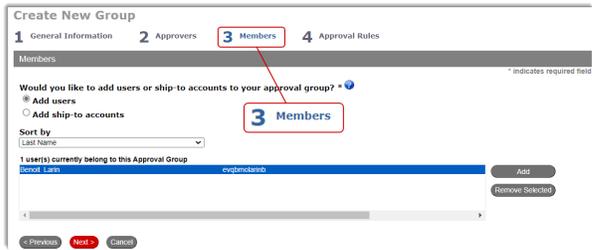
- This last option is used along with the **Selection** feature shown at the bottom of this screen.



- **Yes**, allows users to select the approvers who will receive the email notification for their order during their check-out process.
- **No**, means that all approvers with the **Send Order Notification** flag enabled will receive the approval notification.

- To delete an Approver's name from the group, select the line and click on **Remove Selected**.
- Click on **Next**.

Creation Step 3 - Members



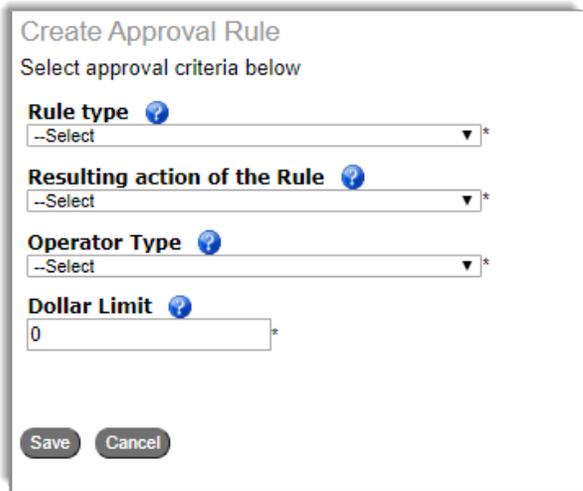
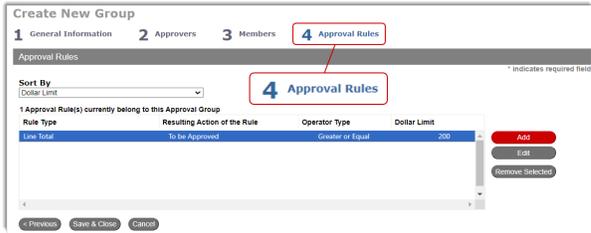
- Name the Buyers who will be subject to the approval rules applied to this group.
 - You can apply the approval rules either to users or ship-to accounts.
 - If you select **ship-to accounts**, the approval rules will apply to all Buyers but only when they order for one of the chosen accounts.
 - If you select **users**, the approval rules will apply to those Buyers regardless of the ship-to account they select.



The selection process is the same for users or ship-to accounts.

- Click on **Add**.
- Use the **Search** to find individuals or ship-to accounts to select as group members.
- To delete a member from the group, select the line and click on **Remove Selected**.
- Click on **Next**.

Creation Step 4 - Approval Rules



Rule Type	Resulting Action of the Rule	Operator Type	Dollar Limit
Line Total	To be Approved	Greater or Equal	200
Order Total	To be Approved	Greater or Equal	500
Order Total	Cannot Order	Greater or Equal	501

- Click on **Add** to start a new rule.
 - There are 2 types of rules based on the dollar amount ordered:
 - Amount on an **order line**
 - Amount of the **order total**
 - There are 3 possible consequences if a rule is broken:
 - **Carbon copy** sends a copy of the order to the approvers, for their information. The order is not stopped for approval.
 - **To be approved** puts the order on hold so that an approver can look at it and then approve, reject or modify it.
 - **Cannot order** prevents the buyer from submitting the order.
 - The **Operator Type** determines how the rule is applied.
 - When the dollar limit is exceeded (to set a maximum)
 - When the dollar limit has not been reached (to set a minimum)
 - Enter the limit amount in dollars.
 - Click on **Save** to confirm this rule.
-
- You can have more than one rule in your group. For example:
 - Have a copy of each order sent to the approvers;
 - Have orders over \$250 approved;
 - And block any order over \$1000.
 - To **Edit** or **Delete** an approval rule, select the line and click on the appropriate button.
 - Click on **Save and Close** to end the creation of your approval group.



The new approval rules take effect immediately.